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ABSTRACT

This module on task management is intended to help the hospitality manager or supervisor meet all the demands of the position and at the same time keep the customer happy. The material is presented in a self-instructional format in eight sections. At the beginning of each section is a statement of the objectives that will be achieved as a result of working through the material that follows. Users of the module are asked to relate information given in the text to their own experience and knowledge. Where appropriate, suggested solutions to these questions are given on the opposite or following page. The eight sections cover the following: (1) great expectations; (2) objectives and tasks; (3) key target areas; (4) standards of performance; (5) problem analysis and decision making; (6) team building; (7) delegation; and (8) giving instructions. (YLB)

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INCREASING OPPORTUNITIES *for* SUPERVISORS AND MANAGERS

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OPERATIONAL MANAGEMENT PROGRAMME

Supervisory Management
MODULE

OPERATIONAL
MANAGEMENT
PROGRAMME

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TASK MANAGEMENT

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HOW TO USE THIS UNIT

The material in *Task Management* is presented in a self-instructional format. It will help build on and consolidate the work covered in the one-day HCTC course of the same title.

Task Management is divided into eight sections. At the start of each section is a statement of the objectives you will be able to achieve as a result of working through the material that follows.

From time to time you will be asked to relate information given in the text to a stated situation, or to your own experience and knowledge. Space is provided below these activities for you to write your answers. Some suggested solutions or guideline answers to the questions are given on the following page.

INTRODUCTION

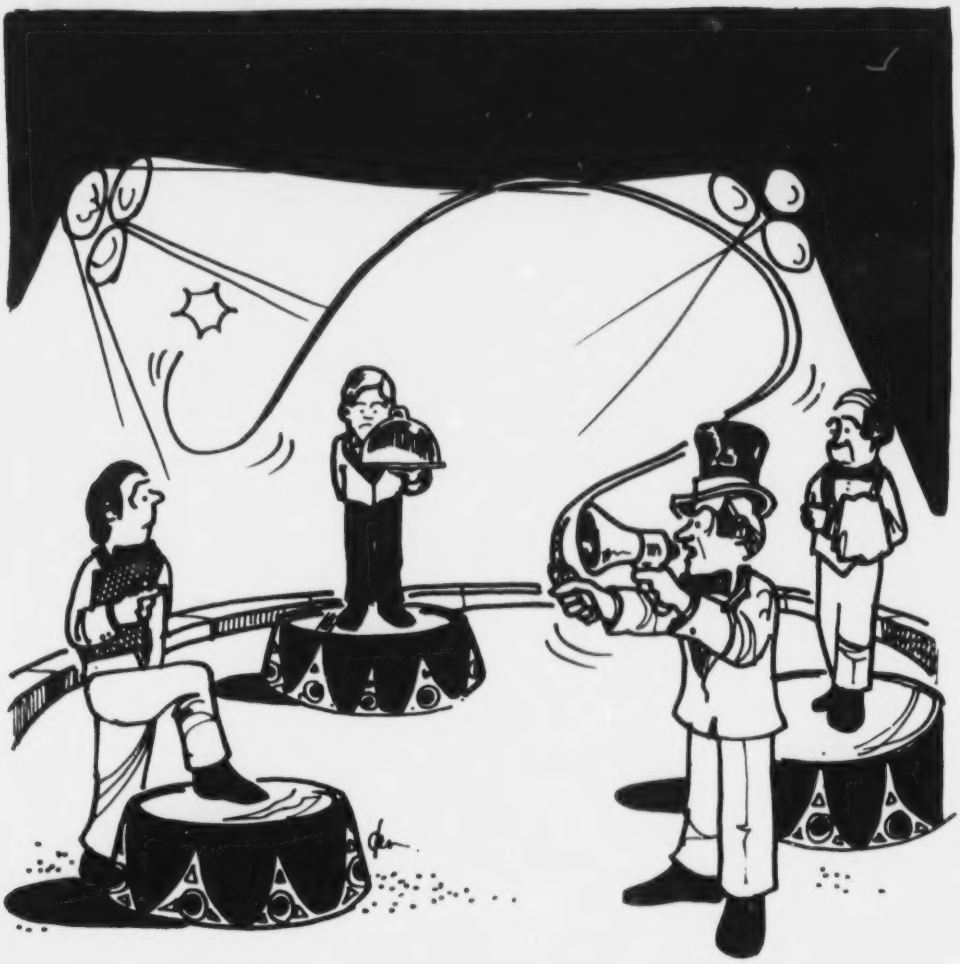
Becoming a supervisor or manager can bring about big changes at work. It can provide the chance to get on, a step up the ladder, to earn more, the opportunity to learn new skills or find out about a different side of the business.

Other people at work will expect changes, too. Targets have to be met, and performance will be measured. Whatever the actual job title, a manager is someone who is expected to get things done through people.

But people are not machines. They have their own ideas about what they should do and want to do. They bring a set of needs and wants which influence getting the job done.

This self-study unit will help you to meet all these demands and at the same time keep your customers happy.

SECTION 1
Great expectations



After completing this section you will be able to:

state what other people expect from you at work

compare your expectations of the job with other people's expectations.

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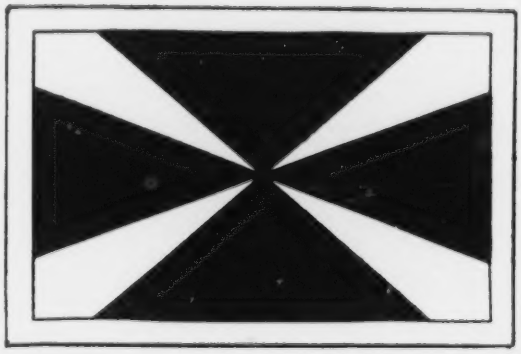
Look at these pictures for 20 seconds, and then write below them what you see. Now ask two other people to describe them. Are their answers the same as yours?



Try this exercise again when you have finished this section, to see whether your answer is the same as the first time.

People view life in different ways, because of the wide variety of influences, childhood, school, and many life experiences. What may be seen one way by somebody, may be viewed quite differently by somebody else.

Consider how Eileen and Mark, who work in the catering department of a conference centre describe a scene involving Sheila, the catering manager.

***Eileen** (cook and kitchen supervisor):*

Having spoken to Mark, Sheila walked straight across the kitchen, ignoring me completely, and stormed into her office. Perhaps she's going to warn me again about my portions.

***Mark** (dining room supervisor):*

I told Sheila there was an enquiry about an extra function for tonight. She went straight into the office and got on the phone.

Using your imagination and clues from the script, think about how these three people relate to each other, and comment briefly below on how valid each person's view might be.

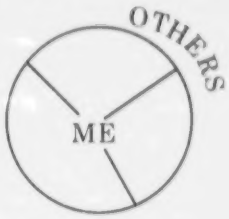
TWO VIEWS OF MANAGING

Whatever the position you hold in your establishment you cannot do your job without relating to other people. You are dealing with your boss, customers, sales representatives, inspectors and most importantly, the people who report to you.

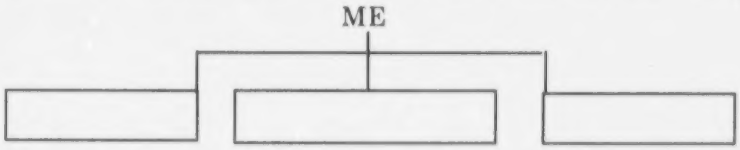
Consider these two views of managing other people:

A

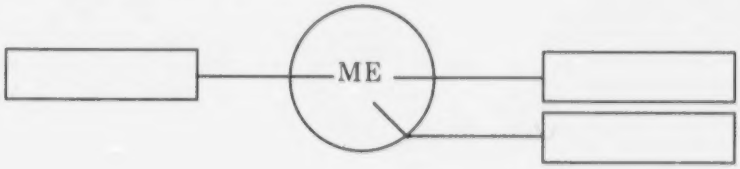
B



Can you see that if you switch from view A to view B your relationship with others at work changes? Try it out for yourself. Think of three people at work to whom you give instructions. First write down their names below – the traditional way of describing reporting relationships.



Now write their names in the format below.

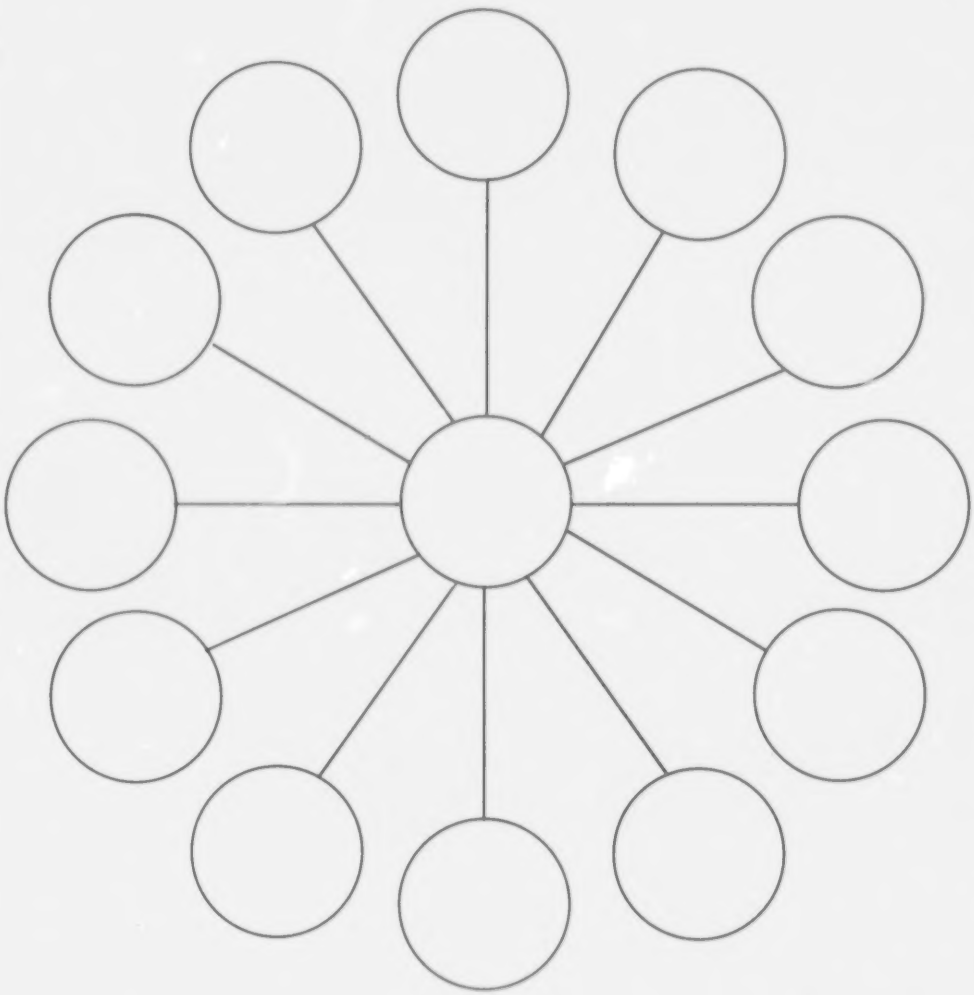


As a result of considering the relationship from the second viewpoint, describe below any difference you have noticed in the way you see the three people concerned.

Managing is more than giving orders and expecting them to be carried out, just because of your position.

Diagram B suggests a group arrangement, with a two-way relationship. You are in the middle, in a strong position to co-ordinate the work of the others; and they will find you more approachable. You will expect them to do their jobs, and they will expect things from you, too.

Write down your job title in the centre circle below. Then, in as many surrounding circles as necessary (you may need to add more), write down the job titles of people who make some demand on you at work, or expect something of you – head chef, bar manager, storekeeper and so forth. Include those outside your workplace – company accountant, central reservations manager – if appropriate.



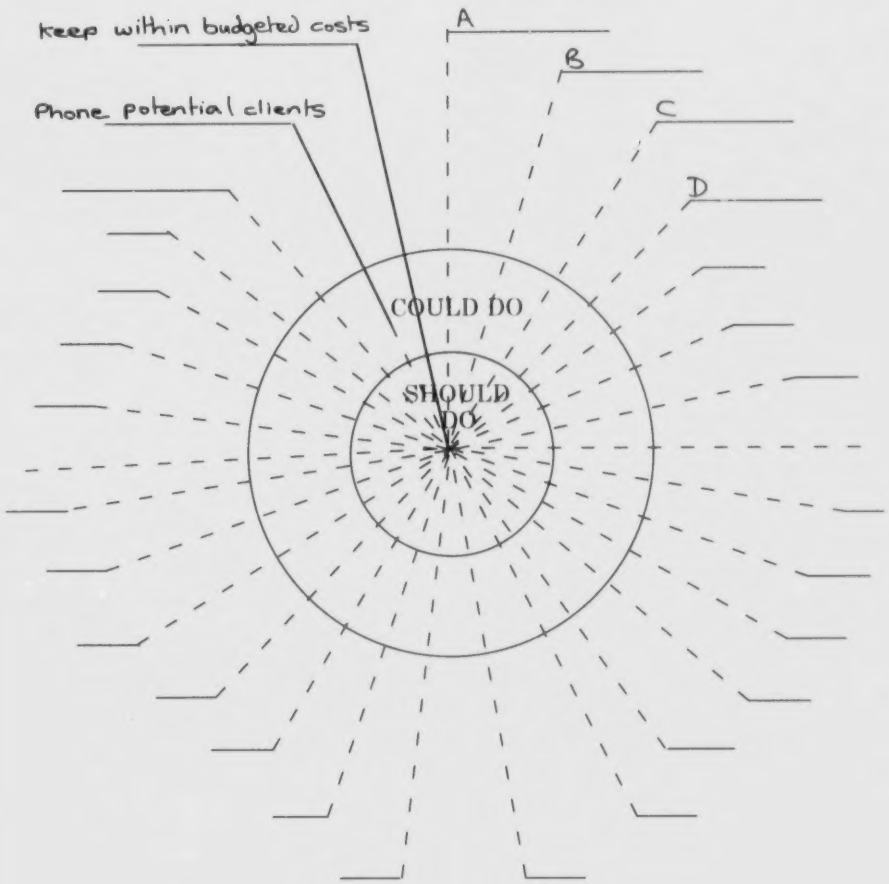
WHAT YOU THINK IS EXPECTED OF YOU AS A SUPERVISOR OR MANAGER

The following exercises will help you compare what is expected of you as a supervisor or manager with what your boss and a (typical) member of staff expects of you.

The outer circle on the page opposite is marked COULD DO, the inner circle SHOULD DO. The circles are crossed by a number of broken lines or spokes. At the end of each spoke is a horizontal line.

1. *On the horizontal line at the top of the diagram (marked A), write down one thing you think is expected of you as supervisor or manager. Two examples are given.*
2. *Write down a second expectation on the horizontal line marked B, a third on the line marked C, a fourth on D.*
3. *Continue round the circle in a clockwise direction, writing down as many expectations as you can think of. There is no particular order, and you should not worry if you cannot think of 28 expectations within a reasonable time (15 minutes or so) - however you can add new lines and spokes if necessary.*
4. *Now take the first expectation you wrote down (A) and show how important you think it is by drawing along the spoke line from the outside to the centre of the circle, using the broken line as a guide. If you think it is essential for you to fulfil it – for instance, failure to do it would lead to serious consequences – draw a thick continuous line (as shown for the example 'Keep within budgeted costs'). A line which stays in the outer circle will represent something which is not vital to your job (as shown for the example 'Phone potential clients').*
5. *Do the same for expectation B, C, D and so forth, continuing around the circle. Your wheel should have spokes of various lengths around it, by the time you have finished.*
6. *Now find out what your boss expects of you. Photocopy the two pages overleaf (pages 10 and 11) and give them to him or her. Once your boss has completed the exercise, attach the photocopied page with the results over the original page 11.*
7. *Also ask someone whom you supervise to indicate what he or she expects of you as a boss. Photocopy pages 12 and 13 for this person (who should not be chosen because you expect flattery!) and when the exercise has been completed, attach the photocopied page with the results over the original page 13.*
8. *Then study the three sets of results, and comment as you feel appropriate in the space given on page 14.*

What is expected of me as a supervisor/manager



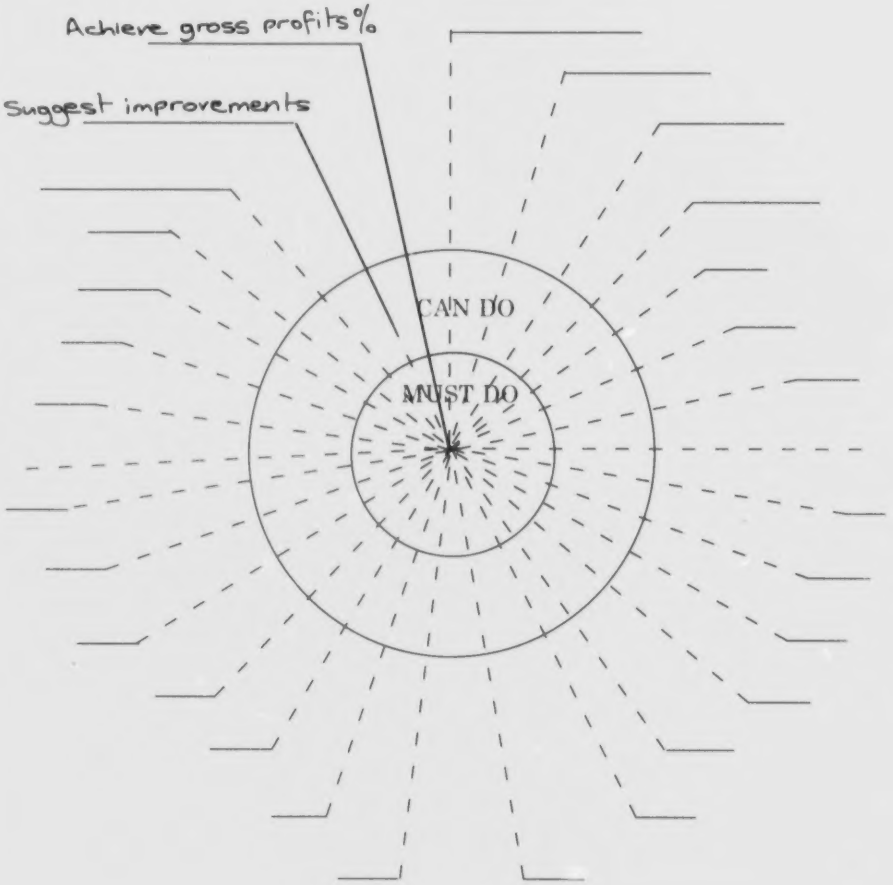
What I expect of _____ as a supervisor/ manager

The HCTC self-study unit Task Management *gives each person studying it a chance to compare what he or she thinks could and should be done in his/her job with what you, as the person's boss, thinks he or she can and must do.*

The outer circle of the accompanying diagram is marked CAN DO, the inner circle MUST DO. The circles are crossed by a number of broken lines or spokes. At the end of each spoke is a horizontal line.

1. *On the horizontal line at the top of the diagram (marked A), write down one thing you expect of the person concerned as supervisor or manager. Two examples are given.*
2. *Write down a second expectation on the horizontal line marked B, a third on the line marked C, a fourth on D.*
3. *Continue round the circle in a clockwise direction, writing down as many expectations as you can think of. There is no particular order, and you should not worry if you cannot think of 28 expectations within a reasonable time (15 minutes or so) – however you can add new lines and spokes if necessary.*
4. *Now take the first expectation you wrote down (A) and show how important you think it is by drawing along the spoke line from the outside to the centre of the circle, using the broken line as a guide. If you think it is essential – for instance, failure to do it would lead to serious consequences – draw a thick continuous line (as shown for the example 'Achieve gross profit %'). A line which stays in the outer circle will represent something which is not vital to the job (as shown for the example 'Suggest improvements').*
5. *Do the same for expectation B, C, D and so forth, continuing around the circle. Your wheel should have spokes of various lengths around it, by the time you have finished.*
6. *Return the completed diagram to the person concerned. (It is suggested it is kept in his/her self-study unit and compared with the person's own diagram and a third diagram completed by a subordinate.)*

What I expect of _____ *as a supervisor/ manager*



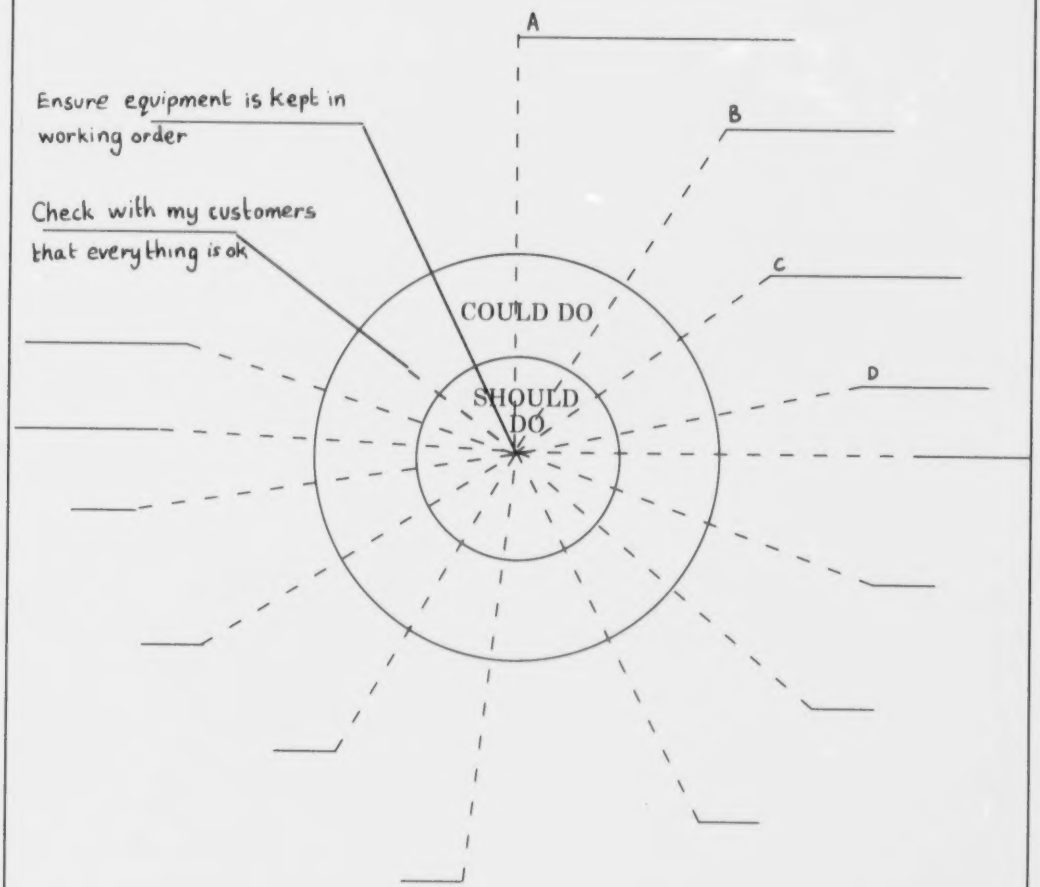
What you expect of your boss

The HCTC self-study unit Task Management *asks each person studying it to compare what you expect of your boss, with what he or she thinks could and should be done in his/her job.*

The outer circle of the accompanying diagram is marked COULD DO, the inner circle SHOULD DO. The circles are crossed by a number of broken lines or spokes. At the end of each spoke is a horizontal line.

1. *On the horizontal line at the top of the diagram (marked A), write down one thing you expect of your boss as supervisor or manager. To start you off on the exercise, two examples are given: 'Ensure equipment is kept in working order' and 'Check with my customers that everything is OK', but of course these might not be appropriate to your work.*
2. *Write down a second expectation on the line marked B, a third on the line marked C, a fourth on D.*
3. *Continue round the circle in a clockwise direction, writing down as many expectations as you can think of. There is no particular order, and you should not worry if you cannot think of 14 expectations within a reasonable time (15 minutes or so) – however you can add new lines and spokes if necessary.*
4. *Now take the first expectation you wrote down (A) and show how important you think it is by drawing along the spoke line from the outside to the centre of the circle, using the broken line as a guide. If you think it is essential for your boss to fulfil it – for example, failure to do it would lead to serious consequences – draw a thick continuous line (as shown for the example 'Ensure equipment is kept in working order'). A line which stays in the outer circle will represent something which is not vital to your boss's job (as shown for the example 'Check with my customers that everything is OK').*
5. *Do the same for expectation B, C, D and so forth, continuing around the circle. Your wheel should have spokes of various lengths around it, by the time you have finished.*
6. *When you have finished, return the diagram to your boss. He or she will be keeping it in the self-study unit that forms part of a course on supervisory skills. It will not be used for any other reason.*

What I expect of my boss as supervisor/manager



What were the differences in the expectations? Perhaps the words used were not the same, but what about the ideas behind them?

How what is expected of me as a supervisor or manager compares with what...

MY BOSS EXPECTS

A (TYPICAL) MEMBER OF MY STAFF EXPECTS

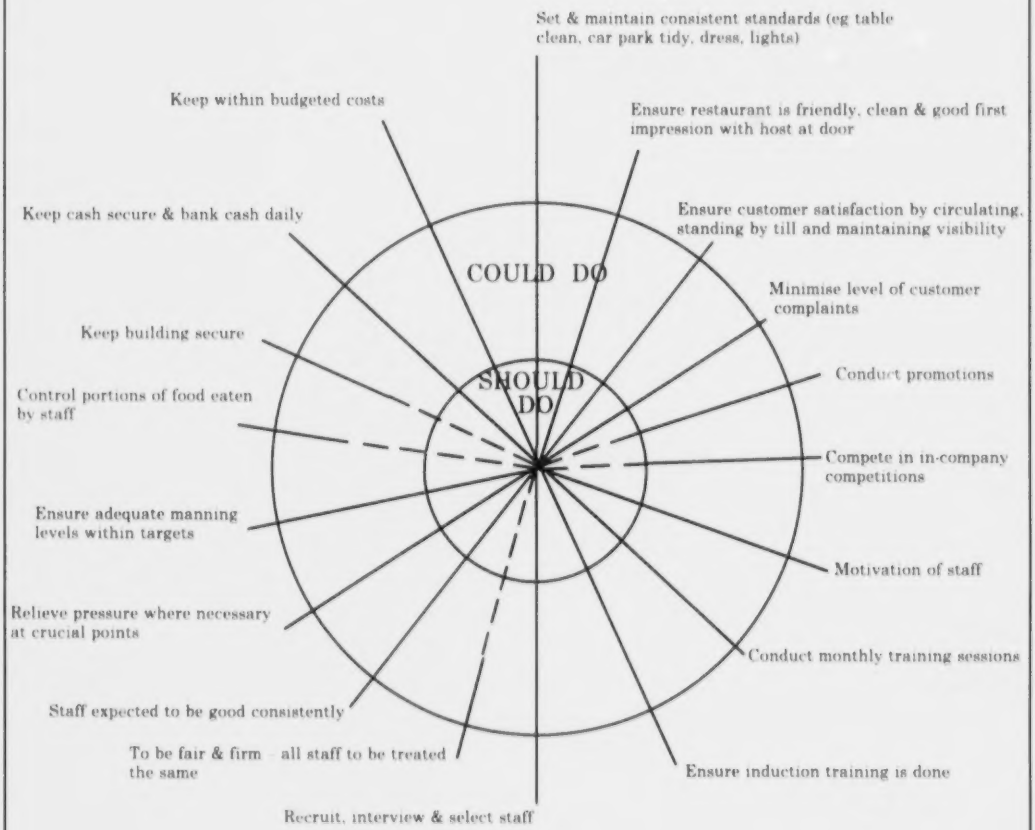
Now is a good time to discuss any important variations with the people concerned.

List below the expectations which were considered most important of all - if necessary taking a consensus view between the three points of view.

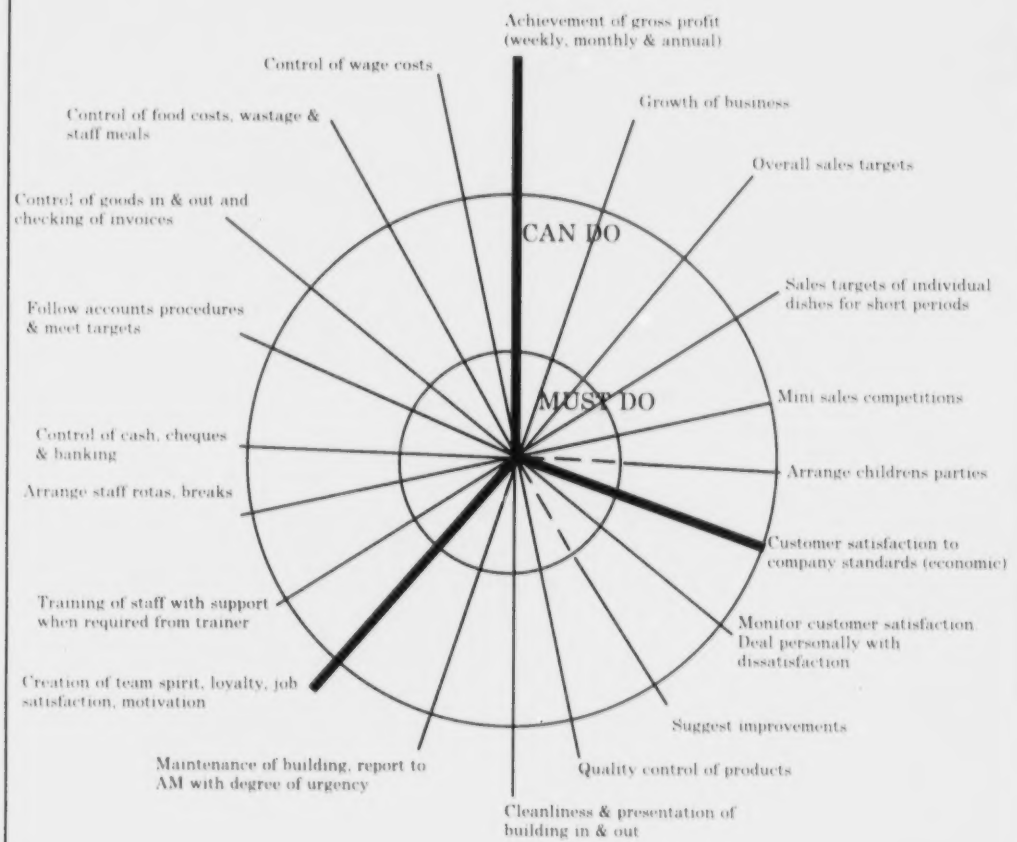
Have a close look at your list of expectations. It is likely that some will be about OBJECTIVES *to be achieved, for example keeping within budgeted costs; while others will be about specific duties or pieces of work or* TASKS *which make up the job, for example submit overtime details to the wages office. Mark up your list to indicate what are objectives and what are tasks (for example by writing O or T against the item concerned, or using different coloured highlighting pens).*

Study the three examples that follow. They were completed for and by a unit manager in a family-owned chain of restaurants. Make a note on page 19 of the expectations which appear in all three versions.

What I think is expected of me by the unit manager

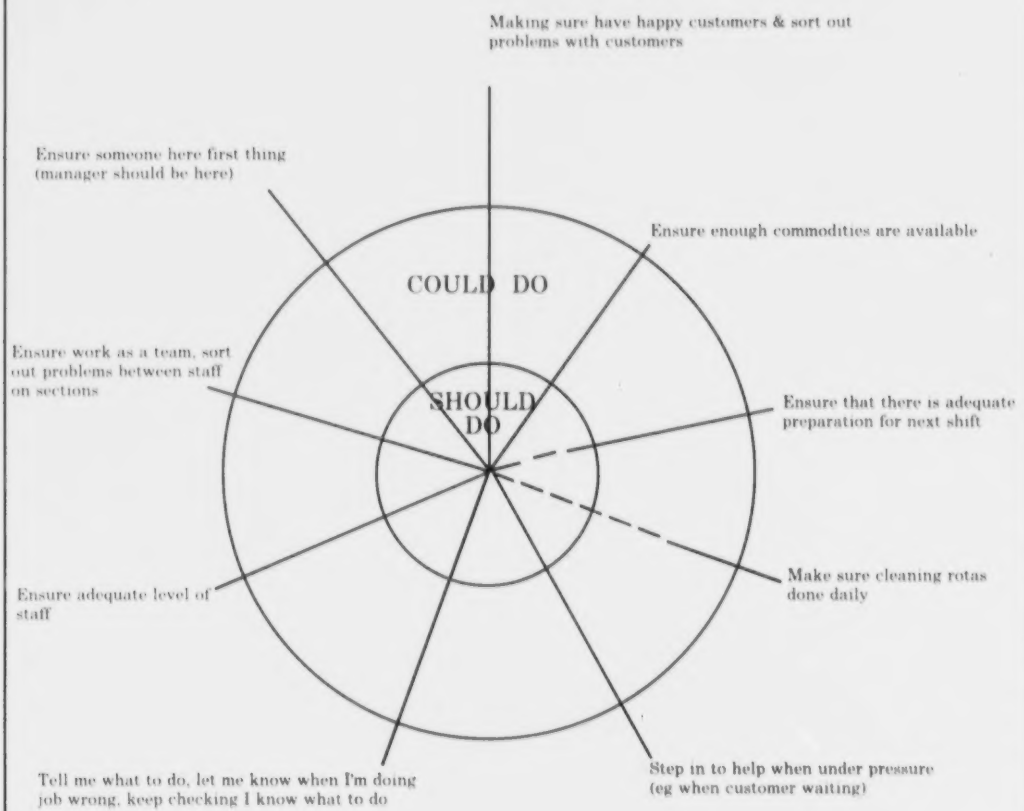

Set & maintain consistent standards (eg table clean, car park tidy, dress, lights)
Keep within budgeted costs
Ensure restaurant is friendly, clean & good first impression with host at door
Keep cash secure & bank cash daily
Ensure customer satisfaction by circulating, standing by till and maintaining visibility
COULD DO
Minimise level of customer complaints
Keep building secure
SHOULD DO
Conduct promotions
Control portions of food eaten by staff
Compete in in-company competitions
Ensure adequate manning levels within targets
Motivation of staff
Relieve pressure where necessary at crucial points
Conduct monthly training sessions
Staff expected to be good consistently
To be fair & firm – all staff to be treated the same
Ensure induction training is done
Recruit, interview & select staff

What I expect of the unit manager by the managing director


Achievement of gross profit (weekly, monthly & annual)
Control of wage costs
Growth of business
Control of food costs, wastage & staff meals
Overall sales targets
Control of goods in & out and checking of invoices
CAN DO
Sales targets of individual dishes for short periods
Follow accounts procedures & meet targets
MUST DO
Mini sales competitions
Control of cash, cheques & banking
Arrange childrens parties
Arrange staff rotas, breaks
Customer satisfaction to company standards (economic)
Training of staff with support when required from trainer
Monitor customer satisfaction Deal personally with dissatisfaction
Creation of team spirit, loyalty, job satisfaction, motivation
Suggest improvements
Maintenance of building, report to AM with degree of urgency
Quality control of products
Cleanliness & presentation of building in & out

In this case, as far as the Managing Director was concerned, a number of expectations were MUSTS but three of these were identifiable as being **most** important and therefore have been inked in more prominently.

What I expect of the unit manager by the chef


Making sure have happy customers & sort out problems with customers
Ensure someone here first thing (manager should be here)
Ensure enough commodities are available
COULD DO
Ensure work as a team, sort out problems between staff on sections
SHOULD DO
Ensure that there is adequate preparation for next shift
Make sure cleaning rotas done daily
Ensure adequate level of staff
Tell me what to do, let me know when I'm doing job wrong, keep checking I know what to do
Step in to help when under pressure (eg when customer waiting)

The expectations which are shared by unit managers in most organisations are:

- maintaining standards
- monitoring customer satisfaction
- training, motivating, disciplining, recruiting staff
- controlling costs, and controlling staff.

How does this compare with your list?

To sum up this section, a supervisor or manager is helped in relating to others at work by:

- realising that work in hotels, catering, leisure and tourism involves service which cannot be done without other people
- understanding that other people have different expectations of the manager.

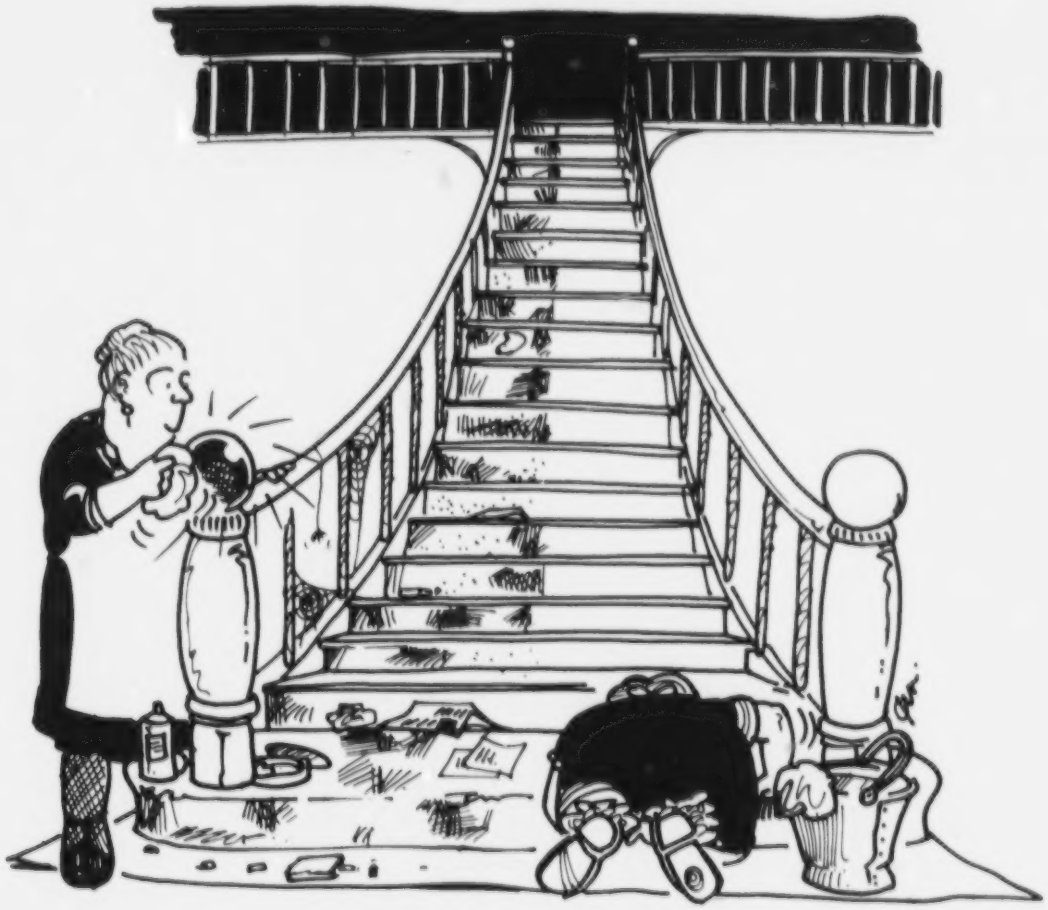
A supervisor or manager will be able to achieve results through other people by:

- being clear about the *objectives* and *tasks* which are expected of her or him
- and thus having greater confidence to ensure that staff are clear about what is expected of them.

Return to the two pictures on page 4. What do you see now? Can you see an old woman, or a young woman? Is the cross you see dark on a light background, or light on a dark background? There is no right or wrong answer, it all depends on your point of view.

Take a short break before starting Section 2 which deals with objectives and tasks.

SECTION 2
Objectives and tasks



After completing this section you will be able to:

describe the distinction between objectives and tasks

determine the appropriate balance between achieving objectives and carrying out tasks in your own job.

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TASK MANAGEMENT

Managers and supervisors are held accountable by their employers for achieving certain objectives within their unit. This will involve managers in activities associated with:

- defining the objectives they need to achieve
- planning how these objectives should be achieved through their own work and that of their staff
- organising staff to carry out the tasks necessary to achieve objectives
- controlling the activities of staff so that tasks are actually carried out
- motivating staff so that they will carry out their tasks to the best of their abilities.

It is the emphasis on planning, organising, controlling and motivating that characterises the work of managers and supervisors and separates their jobs from those of their staff.

It is useful to define the terms *tasks* and *objectives* as they are used in this unit.

Tasks Specific pieces of work required to be done as part of the job, whether they are regarded as a chore or a duty. In a wider sense, the term applies to any piece of work.

Objectives These are the goals, aims or results managers and supervisors are striving to achieve within their jobs. They are concerned with the outcomes from the performance of tasks.

Have a close look at the following list of expectations and repeat the exercise you did on your own job on page 15. You will probably recognise the list – it puts together what the unit manager of the restaurant chain thought was expected of him in his job, illustrated in the diagram on page 16.

Some are about OBJECTIVES *to be achieved, for example keeping within budgeted costs; while others will be about specific duties or pieces of work or* TASKS *which make up the job, for example, draw up staff rotas. Mark up the list to indicate what are objectives and what are tasks (for example by writing O or T against the item concerned, or using different coloured highlighting pens).*

Operate within budgeted costs

Maintain control over cash

Reconcile till roll and cash at the end of each day

Bank cash daily

Keep building secure

Maintain appropriate manning levels

Draw up staff rotas

Relieve pressure on staff by serving at crucial times

Maintain fair discipline

Ensure recruitment and selection policies of the establishment are followed

Design job adverts

Conduct selection interviews

Ensure staff are properly trained

Conduct monthly training sessions

Motivate staff

Maintain consistently high standards in cleanliness, tidiness and dress

Ensure friendly atmosphere in restaurant

Greet customers

Ensure customer satisfaction

Minimise level of customer complaints

Participate in quarterly meetings with other managers

Ensure restaurant conforms to the image required by the family

Ensure pricing attracts the right quality of customer

This is the breakdown you should have arrived at, but organised as two lists to make the distinction as clear as possible.

Objectives to be achieved

Keep within budgeted costs

Maintain control over cash

Keep building secure

Maintain appropriate manning levels

Maintain fair discipline

Ensure recruitment and selection policies of the establishment are followed

Ensure staff are properly trained

Motivate staff

Maintain consistently high standards in cleanliness, tidiness and dress

Ensure friendly atmosphere in restaurant

Ensure customer satisfaction

Minimise levels of customer complaints

Ensure restaurant conforms to the image required by the family

Ensure pricing attracts the right quality of customer

Tasks to be carried out

Reconcile till roll and cash at the end of each day

Bank cash daily

Draw up staff rotas

Relieve pressure on staff by serving at crucial times

Design job adverts

Conduct selection interviews

Conduct monthly training sessions

Greet customers

Participate in quarterly meetings with other managers

You probably noticed some clues in the vocabulary used. Those items allocated to objectives often start with the words 'ensure' or 'maintain' or 'control'.

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It is important that managers recognise that they will be held accountable for achieving objectives rather than the carrying out of tasks. Remember that the role of a manager is essentially to achieve results through other people.

However, managers within the hotel, catering, leisure and tourism industry will find it difficult to avoid carrying out some routine tasks themselves because serving customers is the main activity. For example, most restaurant and pub managers will be prepared to serve the customers themselves when their staff are under pressure.

The balance between being concerned with achieving objectives and carrying out tasks, changes at different levels within establishments.

- All staff, whether service, production, stock room, cleaning, maintenance or reception, will be mainly concerned with carrying out tasks.
- Managers and supervisors will spend a large proportion of their time planning, organising and controlling in order to achieve objectives with some time spent on tasks.
- Area/regional managers and top management at head office will have an even greater emphasis on achieving results.

Have a fresh go at producing a list of the objectives you are expected to achieve in your own job, and what tasks you have to carry out, taking into account what you have learnt since you did the exercise on page 15.

Objectives I am expected to achieve in my job

Tasks I carry out in my job

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- Area/regional managers and top management at head office will have an even greater emphasis on achieving results.

Have a fresh go at producing a list of the objectives you are expected to achieve in your own job, and what tasks you have to carry out, taking into account what you have learnt since you did the exercise on page 15.

Objectives I am expected to achieve in my job

Tasks I carry out in my job

Obviously your identification of objectives and tasks will relate specifically to your own job and it is impossible to provide a standardised answer. However, most unit managers are likely to have objectives which relate to keeping within budgeted costs, organising and controlling staff and resources, setting and maintaining standards, discipline, recruitment and selection, training, motivation and customer satisfaction. Tasks are likely to relate to physically dealing with cash, giving induction and on-the-job training, helping staff when necessary.

Managers should check regularly to ensure that they are spending their time in the most productive way. One way of doing this is to keep a diary record from time to time; this provides a sound base from which to analyse your work.

In detail, this involves:

- keeping a diary record for a short period of the duties undertaken each day
- analysing the duties and separating them into those that relate to achieving unit objectives and those which are concerned with carrying out a task
- critically evaluating whether sufficient time has been allocated to achieving objectives.

There is an example of a diary record of a head barman overleaf.

Read the following diary record of the duties carried out by Phil Goodwin, head barman, one morning. The numbers in brackets are to help you divide what he does into objectives and tasks – more detailed instructions are given later.

10.00 - 10.30	*Arrived at work just on 10.00. Had coffee with Mary & John. Talked about week's rota. Agreed to see if I could change John's day off to Thursday. (1)*
	Checked lounge, cocktail and cellar bars for stock requirements. (2)
	Asked Andy particularly to clean sinks. (3)
10.30 - 11.00	*Went to cellar; started to get stock together. (4)*
	Arthur arrived at 10.40. Told him he was late and that he'd better pull his socks up. (5)
	Carried up spirits to cocktail bar. (6)
	Returned to cellar with two crates of empties. (7)
	Loaded lift with stocks for lounge bar. (8)
	Unloaded lift with Andy's help. (9)
	Returned to cellar and took stock through to cellar bar. (10)
	Checked float in cellar bar. (11)
11.00 - 11.30	*Started to help John bottle up. (12)*
	Mr Pearson came to talk to me about deliveries. (13)
	Asked him if John could have Thursday off if he swapped with Mary. (14)
	Served a couple of customers. (15)
	Checked that everything was in order in front and behind the bar. (16)
11.30 - 12.00	*Mr Pearson came down with new barmaid. Discussed arrangements for interviewing applicants for cellarman's job. (17)*
	Introduced me to Jane and asked me to show her round and then work with her in the cellar bar during lunch. Showed Jane round the bar and cellar. (18)
12.00 - 12.30	*Explained till operation to Jane. (19)*
	Kept eye on her while she served some customers. (20)
	Went up to office to get more change for the till. (21)
	Served customers myself. (22)
12.30 - 1.00	*Served customers in cellar bar. (23)*
	Corrected till reading when Jane made mistake. (24)
1.00 - 1.30	*Served customers in cellar bar. (25)*
	Went up to lounge bar to serve because it was busy. (26)
1.30 - 2.00	*Served customers in lounge bar. (27)*
2.00 - 2.30	*Served customers in lounge bar. (28)*
	Went back to cellar bar to serve near closing time. (29)
	Assisted with clearing up. (30)
2.30 - 3.00	*Counted cash in tills and took till readings. (31)*
	Went off duty.

Work carefully through the entries in Phil's diary. Mark with an O (or in some other convenient way) those entries that relate to the achievement of an objective, for example 'Asked Andy to particularly clean sinks'. Mark with a T (or whatever) those entries that are tasks which Phil carries out for their own sake, such as 'Loaded lift with stocks for lounge bar'.

Now have a go in the space below at organising the objective-related activities under appropriate headings, for example 'Maintain standards'. To save writing, use the numbers which identify the diary entries. (For some more clues on appropriate headings, see the list on page 24.)

And have a go at organising the tasks under appropriate headings, for example 'Supplying the bar'.

You may have a division similar to the one below.

Objectives to be achieved

Ensure adequate staffing level 1,14

Control stocks 2,13

Maintain standards 3,16

Maintain staff discipline 5

Control cash 11,21,24,31

Ensure selection of appropriate staff 17

Ensure that new staff have correct induction training 18,19,20,24

(You will note that 24 has been put under two headings.)

Tasks carried out

Supplying bar 4,6,7,8,9,10,12

Serving customers 15,22,23,25,26,27,28,29

Clearing up 30

Work carefully through the entries in Phil's diary. Mark with an O (or in some other convenient way) those entries that relate to the achievement of an objective, for example 'Asked Andy to particularly clean sinks'. Mark with a T (or whatever) those entries that are tasks which Phil carries out for their own sake, such as 'Loaded lift with stocks for lounge bar'.

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And have a go at organising the tasks under appropriate headings, for example 'Supplying the bar'.

You may have a division similar to the one below

Objectives to be achieved

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Maintain standards 3,16

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Control cash 11,21,24,31

Ensure selection of appropriate staff 17

Ensure that new staff have correct induction training 18,19,20,24

(You will note that 24 has been put under two headings.)

Tasks carried out

Supplying bar 4,6,7,8,9,10,12

Serving customers 15,22,23,25,26,27,28,29

Clearing up 30

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1. *Use this page and if necessary the one overleaf to make your own diary record below for a typical day at work. (You could follow a similar format to the Phil Goodwin example.)*

2. *Read back over your diary entries, and note against each activity whether it is objective-related or a task.*
3. *Have a go in the space below at organising the different objectives and tasks under an appropriate heading, as you have just done for Phil Goodwin. (It will probably be useful to refer back to the list you made on page 26 for the headings.)*

Objectives to be achieved

Tasks carried out

4. *Comment below on how you have got the balance between objectives and tasks.*

5. *If you consider your balance is wrong, note down below what action you can take to restore an appropriate balance. (At this stage you may find it useful to talk to your boss.)*

If you have decided that your balance is wrong, then you need to think how you can devote more time to the planning, organising and controlling of tasks rather than undertaking them yourself. In many cases this means delegating more of the routine tasks to your staff so that you are free to concentrate your time and energy on work which contributes to achieving results. If the reason for your involvement in tasks is because your staff are unable to carry them out efficiently themselves, then you may need to give more induction and on-the-job training, or consider whether the instructions you are giving are sufficiently clear

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This section ends here. Take a break before starting Section 3 which looks at relating your own unit or department objectives with the goals and key target areas of the company or organisation you work for.

SECTION 3
Key target areas

After completing this section you will be able to:

state the four principal target areas that are vital to any business or organisation

relate your own unit or department objectives to these target areas.

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GOALS AND TARGETS

Managers must be able to relate their work to the goals and targets set by their employers. Within the hotel, catering, leisure and tourism industry, the major goals set by employers for their business can be very different. Some may stress profitability, others expansion; all are likely to want to attract customers.

Examples of goals set by service establishments

Privately-owned restaurant (newly established)

- to attract customers from other catering operations
- to increase sales quickly to stop making a loss
- to employ enthusiastic, courteous staff

Privately-owned restaurant (long established)

- to improve standing and status such as extra rosettes, stars
- to expand trade
- to employ mature, highly skilled staff

Contract caterer

- to provide client/company with a satisfactory service within the agreed budget
- to develop staff and managers for new clients as contracts are negotiated

Retail shop

- to trade profitably
- to attract new clients
- to employ a small number of full-time employees and to develop a team of regular part-timers

Department of a store

- to provide a value-for-money service which attracts customers to shop elsewhere in the store
- to make a contribution to the profits of the store

Hotel

- to achieve high room occupancy because room sales generate most profit
- to minimise loss on restaurant operation

Brewery-owned public house

- to trade profitably
- to maximise sales of brewery's own brands
- to avoid trouble and noise in the neighbourhood
- to attract mature, entrepreneurial management couples

Hospital or school caterer

- to provide prompt service and nutritious meals within the budget laid down
- to provide long term job security with potential for promotion

Rail catering

- to provide an additional service for passengers, contributing to their enjoyment of the journey

Clubs (members)

- to provide a service to members
- to be recognised as a prestigious club
- to work within agreed budgets

The key target areas necessary for the management of a business can be broken down into four categories:

Financial targets These are concerned with making profits, minimising losses, working within agreed budgets.

Marketing targets These are concerned with attracting a particular type of customer and thereby increasing sales. They are also concerned with giving satisfaction to the customer.

Product and service targets These are concerned with offering the type of product and service which the employer thinks the customer wants.

Personnel targets These are concerned with attracting, retaining and motivating staff to fulfil the other three targets.

These corporate or company target areas help unit managers to put their own unit objectives into perspective.

Consider once again the unit manager in the family-owned restaurant chain. In the activity on page 23 you were asked to decide which of his expectations were objectives (and which were tasks). In the space below make a new list of the objectives only, this time grouped under the most appropriate heading: 1) FINANCIAL TARGETS, *2)* MARKETING TARGETS, *3)* PRODUCT AND SERVICE TARGETS, *4)* PERSONNEL TARGETS. *Create your own headings for any objectives which you feel cannot be allocated under one of these target areas.*

The suggested allocation is:

FINANCIAL TARGETS

operating within budgeted costs

maintaining control over cash

MARKETING TARGETS

ensuring restaurant conforms to the image required by the family

ensuring pricing attracts the right quality of customer

PRODUCT AND SERVICE TARGETS

maintaining consistently high standards

ensuring friendly atmosphere

ensuring customer satisfaction

minimising complaints

PERSONNEL TARGETS

maintaining appropriate manning levels

maintaining fair discipline

ensuring recruitment and selection policies of the establishment are followed

ensuring staff are properly trained

motivating staff

You may have had difficulty placing 'keeping building secure' in one of these target areas. Ultimately it contributes to product and service targets but you may have created a separate target area labelled 'Security'. You might also have wondered where to put 'ensuring customer satisfaction' and 'minimising complaints' - while they relate to the quality of service they are also contributing to marketing targets.

Although corporate or company targets must be met by all those within the organisation, different levels of management have to respond to different kinds of expectations and therefore place emphasis on particular target areas. For example:

- Most employers and senior managers are very concerned about financial targets such as keeping costs down and trading profitably, together with marketing targets of trying to attract the right kind of customers to achieve their financial targets.
- Most unit managers, who have to meet customers and have direct responsibility for staff, place an emphasis on maintaining the standards of their product and service, as well as selecting and retaining the right kind of staff to achieve personnel targets.
- Most section supervisors, who are actively involved in delivering the product to the customer, are concerned with product/service targets.

Despite the concentration on product/service and personnel targets, unit managers must ensure that their own objectives are compatible with the target areas set by top management.

1. *Identify the targets set for the establishment in which you work - by the employer, company, or organisation you work for. List them in the second column of the table below under the most appropriate target area.*
2. *Look again at the list you made of your objectives (on page 26) and identify those which relate to each of the target areas. List these in the third column of the table.*

Target areas	*Targets set by your employer*	*Your objectives as a unit manager*
Finance		
Marketing		
Product and service		
Personnel		

The exercise you have just completed will help you to

- see how your own job fits into the management of the whole establishment, company or organisation
- identify any targets to which you are not contributing
- identify any difficulties created within your own job because of the targets set by those above you

With these aims in mind, look again at the list you have just made of your employer's targets and your unit objectives. Use the space below to note:

1. *employer's targets against which you have a blank*

2. *any of your objectives as a manager/supervisor which do not contribute as fully as they might to the targets set for the company/ organisation as a whole*

3. *any targets set by your employer which are in conflict with one another when it comes to achieving results within your own unit*

1. If you had any gaps, then you should consider whether there are any additional objectives you ought to be achieving which could assist in reaching this target.
2. In some cases the results from your own unit may be contributing in some measure towards targets, but there is scope for improvement. If this is the case you need to consider what else you could do or whether your own job needs to be more precisely defined.
3. Often unit managers will find that trying to achieve the various different targets creates conflict. For example, you may feel that having to keep within specified wage costs affects your ability to achieve the standards of service which are required.

Whenever you are considering redefining your objectives to relate more closely to key target areas, it is advisable to discuss this with your own superior.

This section ends here. Take a break before starting Section 4 which looks at standards of performance.

SECTION 4
Standards of performance

After completing this section you will be able to:

identify the information which needs to be specified in setting standards of performance

set standards of performance for tasks within your own unit.

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So far in this unit you have learned how to classify the overall goals of your business into different key areas and to examine your own objectives and tasks in relation to these.

It is not sufficient for managers to know the kind of duties and tasks which must be performed by them and their staff – it is essential that they also know exactly what standards of performance are required. For example, athletes competing for an international event would not be content to state that their task was only to run a certain distance; each one would add that his or her aim was to cross the tape ahead of everyone else and to achieve that within a specified time limit.

The same applies at work. Telephonists know they are employed to handle the switchboard and transfer calls. However, to do the job well, a telephonist needs to know exactly how to answer incoming calls. Serving staff in the restaurant know that their job is basically to serve food and drink, but they also need to know what style and standard of service are expected.

Perhaps you have heard this verse by Kipling? Its message is at the heart of effective standard setting and instruction giving.

I have six honest serving men

they taught me all I knew

their names are what and how and when

and why and where and who

Read the following case study. At the end you will be asked to identify why Jean McDonald did not manage to meet the improved standards requested by her manager.

Jean McDonald is head housekeeper of the Cutty Sark Hotel situated on the seafront of Southbourne, a typical resort town on the south coast. The hotel, built in 1890, has five floors with 112 rooms, of which 87 are twin-bedded. During the summer Jean has around 20 room attendants, cleaners and porters in her department under the supervision of herself, a deputy and three floor housekeepers - her senior staff.

She is particularly concerned with the administration of her department and does not spend much of her time supervising staff. She does, however, pay particular attention to the cleaning and maintenance of the public areas and usually manages to visit each of the floors at least once during her working day. Along with other heads of department, she attends weekly meetings with the management and regularly holds an informal meeting of her senior staff every morning.

At the end of a recent weekly meeting of heads of department, the general manager took Jean to one side to tell her that the hotel had received five letters in the past month which were critical of the standards of cleanliness of the bedrooms. The manager also expressed concern at the high employment costs of the housekeeping department. Jean took this criticism well, accepting that it was her responsibility to see that guests found the accommodation entirely satisfactory.

At the next informal meeting with her senior staff, Jean told them of the general manager's comments. She said she would try to spend more time herself on the floors, but that they must each pay particular attention to improving the standards of servicing of the rooms.

As a result of this conversation a number of things happened. The deputy housekeeper went away and when inspecting the first bedroom she came to, looked under the bed. She found it was very dusty so she made a point of telling the staff responsible for that floor to make sure they vacuumed under the beds in each room at least once a week.

A newly-promoted floor housekeeper took no particular action, but she was careful to look at the rooms and to ask her staff to put right anything she found wrong. The floor housekeeper for the second floor immediately called her staff together and told them what Jean had just said. She added that Jean was going to be on the prowl, so they had better buck their ideas up.

The longest-serving floor housekeeper did nothing. As far as she was concerned, the criticism was unjustified.

For the new few days Jean made a point of inspecting some of the bedrooms herself. She made a few comments to individual members of staff about specific matters, but generally she felt that things were not as bad as the general manager had suggested. She was careful to thank each of her supervisors for making the extra effort.

One morning, two weeks later, the general manager asked to see Jean. He showed her a letter received that morning from a guest. Apparently the towels in her bathroom had not been changed for the entire three days of her stay. The manager added that Jean's employment costs were still very high. He explained that she was looking into the whole question of servicing the rooms and that it was very difficult to maintain a consistently high standard when her staff turnover was so high. Employment costs were high because the staff were not experienced enough to service the number of rooms expected of them.

Below and on the page opposite, identify why you think Jean McDonald failed to improve standards.

Jean's main mistake was that she had only identified the overall objectives when she spoke to her senior staff, that is, the improvement in cleanliness and reduction in labour costs.

Although she had instructed her senior staff to improve the standard of servicing of the rooms, she was not precise in how they were supposed to do to do this, nor how they would know if the appropriate standard had been achieved.

Consequently, each of her senior staff made their own assumptions about the problem and acted accordingly.

It is a manager's responsibility to identify the task which must be carried out by a member of staff and the standards of performance she or he expects.

If effective standards are to be maintained, it is important that you decide the answer to each of the following questions in relation to any tasks you ask your staff to perform.

- *Who should carry out the task?*
  You need to allocate a task to someone who has the skill to carry it out.
- *What needs to be done?*
  You should be clear in your own mind exactly what needs to be done and then give clear instructions to staff.
- *How should the task be done?*
  There are often many ways of carrying out a task – some effective, others less so. It is therefore necessary to know how you want the task completed.
- *When should it be done?*
  Timescales are sometimes crucial in the satisfactory completion of tasks. Staff need to know by when they should have completed the task and how long it should take them.

Written standards of performance will enable you to give clear and accurate instructions, and to train staff more effectively. They should provide the answers to each of these questions, and cover the task in a logical order.

The example opposite shows how Jean McDonald might have clarified the standards for servicing bathrooms.

CUTTY SARK HOTEL

Standards of performance

Identification of task to be carried out:

Servicing bathrooms.

Job title/name of person who should complete this task:

Room attendant

Steps involved in completing the task:

1. Vitreous surfaces wiped clean and polished.
2. Floor mopped and dried.
3. Dirty towels removed and clean towels placed on towel rack.
4. Used soap replaced.

Standards of performance required:

All surfaces free of dust, grime, streaks and shiny.
Floors free of dust, debris or standing water.
Fresh towels and soap provided daily.
Faults are reported to the Floor Housekeeper.
Appropriate cleaning equipment and materials are used.
Cleaning is carried out safely and hygienically.

Average time to be spent on each step and to complete task:

1. 4 minutes
2. 1 minute
3. and 4. 1 minute

Total time for each bathroom = 6 minutes
Task to be carried out daily.

Written standards of performance should be capable of answering the kind of questions staff ask you. The Jean McDonald example answers the question 'how clean?' fairly satisfactorily. It is easier to express some standards by adding the words 'so that':

> To answer incoming calls promptly *so that* the telephone does not ring more than 4 times before being answered.

The standards you set must be:

- sufficiently detailed so that staff can understand exactly what is required
- measurable in some way so that you can judge easily whether they are being achieved.

Another important criterion for standards of performance is that they should be seen by staff as *realistic to achieve* once training in the task has been given. This is particularly true of standards which involve time taken to do the task.

If standards are not realistic, staff will become demotivated because they are unable to achieve them. Sometimes, with staff who are still undergoing training, it is possible to set intermediate standards which are less demanding than those you require of fully trained staff. In this way staff can gradually build up their expertise and their confidence.

> Setting customer service standards is dealt with in greater depth in the self-study unit *Customer Care Management*.

Have a go in the space below at drawing up standards of performance for a task carried out by a member of your staff. Try and select a task which is not yet covered by a written standard of performance, or one where the standard needs to be reconsidered for some reason.

TASK TO BE CARRIED OUT:

JOB TITLE OF PERSON WHO SHOULD COMPLETE THIS TASK:

STEPS INVOLVED IN COMPLETING THE TASK:

STANDARDS OF PERFORMANCE REQUIRED:

AVERAGE TIME TO BE SPENT ON EACH STEP AND TO COMPLETE TASK:

Will your standard of performance:

- successfully communicate
  - what the task is?
  - who should do it?
  - how it should be done?
  - (if appropriate) where it should be done?
  - when it should be done?
- be seen as realistic to achieve by staff (otherwise they might just give up)?
- be measurable in some way (so that you can judge easily whether the standards it sets are being met)?

Take a short break before proceeding to the next section, which deals with problem analysis and decision making.

SECTION 5
Problem analysis and decision making

After completing this section you will be able to:

define a problem and identify its underlying cause

set objectives for decision making and generate options for action

evaluate and select the best option.

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PROBLEM ANALYSIS

Problem analysis and decision making are linked activities. Many decisions – although not all – are made to solve problems which have arisen. Let's look first, therefore, at an approach to problem analysis.

By 'problem' is meant something which is wrong, something not as it should be. A problem may, in general terms, be defined as a 'deviation from standard' or from what is expected. (This definition underlines the importance of targets and standard setting which were dealt with in Sections 3 and 4. Clear standards enable you to know *when* you have a problem, and *how big* a problem you have.)

So, as an example, problems could exist in any of the following areas:

- excess costs – above budgeted levels
- sales below targets
- excessive complaints from customers
- poor time-keeping by staff
- hygiene or safety standards not being met.

Note down on the opposite page any areas in which you think your own company or organisation has a problem – that is, where things are not as they ought to be in relation to standards, targets, or expectations. Specify each problem as precisely as you can, and, if possible, quantify it. (It is important for the other activities you will be asked to complete in this section, that you specify at least two problems.)

Before you can decide what to do about any of these problems, you need to undertake a *problem analysis* to find out the cause of the problem in each case.

The problem itself – the deviation from standard – can be thought of as a symptom. You could liken it to a pain: your doctor cannot treat a pain directly, he or she must find the cause and treat that. Problem analysis is a *diagnostic process*.

Read the following case study which describes a manager's unsuccessful attempt at problem solving, then answer the questions on the page opposite.

The Pines is a large country hotel, in an attractive setting, with an excellent reputation for its accommodation and food. It has been decided to try and attract conference and meetings business, and a new block has been built with rooms of varying sizes to accommodate meetings, seminars, conferences and similar events.

Roger Westbrook, general manager of The Pines, has to decide who should have specific responsibility for running the new operation. George Foster, the banqueting manager, is clearly anxious to have the job and claims to have had previous experience. He is an enthusiastic and ambitious man, currently responsible for a range of functions – receptions, special dinners, presentation evenings, and so forth – an aspect of the hotel's work which he has built up very rapidly during the last year. Roger Westbrook is persuaded that George would be the best person to put in charge.

The new facilities are advertised and there is a good response from a variety of business organisations. Unfortunately the brisk business is marred by several serious complaints from customers about rooms not being properly set out, audio-visual equipment wrongly placed, and so forth.

In looking into the matter, Roger Westbrook forms the opinion that the staff working in the new area have been inadequately trained by George Foster. He sends George away on a course on conference organisation and tells him to ensure that his staff are all thoroughly instructed in all the necessary procedures. George Foster attends the course, protesting that he does not need it.

Some time after his return from the course Roger Westbrook is still receiving more customer complaints than he considers acceptable.

Clearly Roger Westbrook, although he has taken action, has not tackled the basic cause of the problem. What do you think this might be, and what more should Westbrook have done to find it? Note down your ideas below.

When Roger Westbrook tackled George Foster again he discovered the root cause of the problem. George – with a rapidly expanding function business, simply had too much on his plate. Being enthusiastic and ambitious he had over-reached himself and did not have sufficient time to deal adequately with all his responsibilities. Westbrook might have discovered this earlier, if he had discussed the matter more thoroughly with George instead of jumping to conclusions.

So the *problem analysis* sequence looked like this:

Problem
Unacceptable level of complaints from customers regarding conference and meeting arrangements.

Immediate cause
Staff in conference block not sufficiently well trained and supervised.

Underlying cause
Banqueting manager has excessive workload.

Roger Westbrook must, therefore, address himself to this, which requires him to move into the *decision making* process.

Now look at the problems you listed in your own organisation. Pick out two and consider their possible causes – if necessary going back further than the immediate cause. Note these in the space opposite.

Then note how you can check whether your analysis is correct. What additional information do you need? Who has it? Who else do you need to talk to?

Problem 1 *(brief description)*

Possible causes

How analysis can be checked

Problem 2 *(brief description)*

Possible causes

How analysis can be checked

DECISION MAKING

The process you have just worked through is something less than problem solving in the full sense. It is a process of analysis, and for a problem to be fully solved that is, for things to be put right, you need to take *action*. Action can only follow from decision making.

The first step in decision making is to decide on the *objective* what it is that you are trying to achieve.

Consider the problems at The Pines, and note below which of the following you would choose as an objective for Roger Westbrook, briefly explaining why.

1. To reduce the banqueting manager's workload.

2. To ensure that conference staff are fully trained and adequately supervised.

3. To eliminate customer complaints regarding conferences and meetings.

No 3 should have been your choice. The original problem was defined as too many complaints and the aim must be to eliminate these. This is how Roger Westbrook will measure whether any action has been successful. Training of conference staff is a means to an end, and would be part of an action plan, but is not an end in itself. Reducing George Foster's workload, again, is not an end in itself – it is just one of a number of *options* for action.

Now look again at your own problems, which you have analysed, and write down in the space below an objective to be achieved in each case. (Note that this is the same sort of thinking which you went through in Section 2 on objectives and tasks.)

Problem 1: objective to be achieved

Problem 2: objective to be achieved

Generating options

Decision making is concerned with *choices*. If you have no choice there is no decision to be made. Having defined your objective you need to consider how many ways there are of achieving it – how many *options for action* you can find. In some cases you may have to do this alone. In other cases you can do it with other people – perhaps with one person who is particularly involved, or with a group.

It is a good idea to get as many suggestions as possible in the first instance, without worrying whether they are sensible or practical, or what they would cost. This is known as *brainstorming*. If you are involving other people, just get them to suggest any possible course of action that comes to mind, and note them all down, not allowing anybody to be critical or make negative comments. This encourages people to generate as many ideas as they can.

Then, when the flow of ideas has been exhausted, take each one in turn and examine it to see how practical it is.

Taking the example of The Pines, with the objective of eliminating customer complaints regarding conferences and meetings, see how many options for action you can think of, how many ways of solving the problem, and note them down below.

Here are some possibilities which you may have thought of:

- Create a new post of assistant banqueting manager.
- Create a separate post with responsibility for all conference work.
- Re-design the banqueting manager's overall job, allocating selected duties elsewhere.

All these options arise as a result of identifying the underlying cause of the problem as the banqueting manager's workload, so any action must deal with this. Perhaps there were other options which you were able to think of. If so, keep them in mind for the next part of this section.

Now take your own problems, for which you have defined the objectives you need to attain, and see how many options for action you can generate. If you wish, at this stage, you may choose to work through this part of the exercise with the appropriate members of your staff. Use the space opposite to note your options.

Problem 1: options for action

Problem 2: options for action

Choosing the best option

This is the stage of actually making the decision for which you have been preparing: deciding which course of action to take. To do this, you need to answer certain questions in respect of each of your options. These should be answered as precisely as possible, although predicting the outcome of a decision is not an exact science.

Some key questions to ask are:

- Would it work? Would this course of action actually enable me to meet the objective?
- If more than one option meets this criterion, consider any particular or additional benefits from each.
- What would it cost? This could be in materials, equipment, fees, staff time, and so forth.
- What are the risks? Are there any possible unwanted side-effects?
- Can I get commitment to the decision? Without staff commitment decisions can be difficult, sometimes impossible, to implement successfully.

Your final decision will result from a balancing of these factors.

Refer back to the three options for action which Roger Westbrook has at The Pines (and include, if you like, any other options you thought of). Use the space opposite to briefly answer each of the five questions, for each of the three options.

	Option 1	Option 2	Option 3
1. Would it work?			
2. What particular or additional benefits are there?			
3. What would it cost?			
4. What are the risks?			
5. Can I get staff commitment?			

Now note which option you would choose if you were general manager of The Pines.

- Creating an assistant post would probably work. It would entail extra staff cost, but would help to give cover and continuity for the banqueting manager's job, in the event of anything happening to George Foster.
- Creating a separate post would also probably work. It would also require extra staff cost, and it would be necessary to work out processes for liaison and co-operation between this post and the banqueting manager. Also, would it be easy to get George Foster's commitment?
- It is difficult to say whether an overall re-design of George's job would work, or whether it would be practicable, without looking at it in detail. It could entail an awkward fragmenting of responsibilities.

On balance it looks as though the first option – the new assistant post is going to be the best bet. It is not unreasonable to create extra management cost for a major expansion of activities – indeed it may be unreasonable to try to do it without – and this option also has additional benefits.

Now go back - for the last time – to your own list of problems, and the options you have generated. Consider each option carefully against each of the five questions – make some notes opposite, check cost figures if appropriate, and make your decision on which is your own chosen option.

	Problem 1	Problem 2
1. Would it work?		
2. What particular or additional benefits are there?		
3. What would it cost?		
4. What are the risks?		
5. Can I get staff commitment?		

Now note which option you have chosen

There are some crucial questions regarding the actual handling of the decision making process in practice, which fall outside the scope of this self-study unit. These questions concern such matters as who, if anybody, should you involve or consult, and to what extent should other people have a say in making the decision? How far should you take it on yourself to make decisions and simply communicate them to staff? These questions go into the issue of management style and are fully dealt with in the companion title *Leadership and Motivation*.

Take a break before starting the next section, which deals with team building.

SECTION 6
Team building

After completing this section you will be able to:

identify the characteristics of a good working team

relate the personnel objectives within your own unit to the development of an effective team.

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In Sections 2 and 3 you have looked at:

- your objectives as a unit manager/supervisor
- how these objectives relate to the key target areas of your employer.

But unless thought is given to the needs of the people who help meet these objectives, there is little likelihood of success. Remember that the role of a manager is essentially to achieve results through other people - to repeat the point made early on in Section 2. Good work is achieved through a harmonious, happy team, not through a number of discontented individuals.

What do you think are the characteristics of a good work team? Jot down your own ideas in the space below.

A good work team is one which has:

- the appropriate range of skills to carry out the necessary tasks
- a number of people who share the same values, priorities and care about their work as well as for their fellow workers
- a communication network which enables staff to carry out their work speedily and with interest
- a manager who is accepted and respected by the team, who shows a commitment to task achievement, is able to set a good example, clarifies standards and is fair.

Of course, the last characteristic mentioned above identifies the manager's role in team-building. And to build a successful team managers must pay careful attention to personnel targets and personnel-related objectives.

Read the following case study looking out for clues to activities which relate to personnel targets – for example motivation – carried out by Stephen Waites, the manager. You will be asked to identify these and make some observations about them at the end of the case study.

Stephen Waites, 32 years of age, works for Graydon Caterers as catering manager at a private boarding school. The school has used contract caterers for some years. Stephen first trained as a chef in a hotel, studying for his City and Guilds cookery qualifications on a day release basis at a local college. Shortly after getting married he moved over to the contract catering sector.

Stephen has complete responsibility for all aspects of the school's catering, providing breakfast, lunch and supper every day for over 400 pupils and staff. On at least two days a week, when his head chef has his days off, Stephen does all the cooking.

Stephen explains:

'Basically I have to take all the worry of catering for these boys off the shoulders of the school. They want prompt, courteous service and, of course, they want value for money.

'They set the budget for how much they are prepared to spend for each person each day and we have to stick to it. I have two full-time staff working in the kitchen, the rest are part-timers, but they are very good. I appoint all the staff except the head chef. But they have all been working with me now for several months and there are never any problems. I try to involve them as much as possible in the running of the unit. For instance, I always discuss with the chef the menus and dishes we put on. The company has an induction programme for all new staff, but I make sure that new staff are made to feel at home. It is not easy getting staff out here in the country, particularly trained staff. Most of the part-time women we have to train ourselves. Apart from two days a week when I am in the kitchen, most of my time is taken up with ordering goods, checking in supplies, dealing with paperwork and calculating our operational costs on a weekly basis. I also attend various meetings within the company and hold my own informal meetings with my staff.'

The head chef has this to say:

'The catering manager here was a chef, so he knows a lot about how to get things done. He basically does all the paperwork and ordering. He doesn't get too involved in the kitchen, except on my days off. He also talks to the school staff about the meals, although he likes me to talk to the staff as well.

'He employs all the staff we need, which is a major headache since most of the part-timers have never worked in a catering kitchen before. He and I make sure that everything is done to help new staff settle in, because we know how difficult it is to replace them. The manager here is good at getting the best out of people and staff only leave if they have to. At the same time he does not stand for any nonsense.'

A part-time employee comments:

'I can't really say very much about what Mr Waites has to do. He keeps a close eye on things and makes sure we are doing our jobs properly. He is a very good boss to work for. Before I came here I worked in a factory and they didn't care a thing about you. But here you are made to feel very welcome the moment you walk in. It is a very happy place to work in. Mr Waites seems to care about what you do.

'He is also very helpful and understanding. My husband was taken into hospital a few months back and he helped me by re-arranging things so I could visit him. He comes into the kitchen a couple of days a week but the rest of the time he is in his office. But not much goes on without him knowing about it. The butcher tried to deliver some meat last week that didn't look too good and Mr Waites didn't hesitate to send it back.'

Below and on the next page:

1. *Write down the activities you have noted which relate to personnel targets.*
2. *Against each give examples extracted from the case study of how Stephen gets the best from his staff.*

(Cover page 79 first so you are not distracted from giving your own ideas.)

You have probably identified the following activities which relate to personnel targets.

SELECTION

'I appoint all the staff except the head chef.'

INDUCTION TRAINING

'The company has an induction programme for all new staff, but I make sure that new staff are made to feel at home.'

'He and I make sure that everything is done to help new staff settle in because we know how difficult it is to replace them.'

'You are made to feel very welcome the moment you walk in.'

JOB TRAINING

'Most of the part-time women we have to train ourselves.'

MOTIVATION

'I try to involve them as much as possible in running the unit.'

'I hold informal meetings with the staff.'

'It is a very happy place to work in.'

'Mr Waites seems to care about what you do.'

'The manager here is good at getting the best out of people and staff only leave if they have to.'

DISCIPLINE

'He does not stand for any nonsense.'

Stephen obviously realises that paying attention to team building helps him in achieving his objectives as a manager.

Here are some guidelines on how managers can build effective teams, who will achieve unit objectives:

Selection

New employees should be selected, if possible, who:

- have the skills to do the job, or an aptitude which will enable them to learn quickly through training
- show interest in the job so that they are likely to achieve some personal satisfaction from it
- will fit in with the existing members of the team.

Induction training

All new employees should have a good introduction to:

- the establishment, its objectives, structure and people
- their specific job and the activities they will carry out
- the people they will work with.

Job training

A manager should identify training needs in staff and make arrangements for the necessary training to be carried out.

Motivation

A motivated team is one which does a good job willingly! This means:

- caring about staff
- being sympathetic to their needs
- keeping them informed
- involving them in the decisions affecting their work as much as possible.

Discipline

The crucial word here is 'fair' discipline. A good team respects a manager who explains clearly what performance standards are expected of them, who sets realistic and achievable standards and then disciplines those falling short of such standards without discrimination or favouritism. A good manager will always set a good example to his/her own staff.

All these aspects are considered in greater depth in the self-study units which make up the Personnel Management module:

- *Getting the Right Staff*
- *Rights and Responsibilities*
- *Staff Retention.*

Describe below your own action plan for team building among your staff, organising your ideas under the appropriate heading.

Selection of staff

Induction training

Job training

Motivating staff

Disciplining staff

Your proposals should take into account the guidelines on page 80, but will obviously be more specific to your own situation, for example:

- produce an outline of skills and qualities needed to do each job
- prepare a new staff induction training programme which will take into account the company's policy to recruit a higher proportion of married women returning to work
- submit recommendations for health and safety training to head office
- hold staff meetings every Friday
- revise the staff handbook to explain company rules and standards of performance more clearly

Take a break before starting Section 7 which deals with delegation.

SECTION 7
Delegation

At the end of this section you will be able to:

recognise what and when to delegate

recognise the barriers to effective delegation

identify methods for more effective delegation.

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In order to be a good leader or motivator, the supervisor or manager must learn to delegate effectively.

Delegation involves giving staff the responsibility for a certain job and the authority to do it while retaining overall control. Delegation is not the same as assigning work.

When managers or supervisors work out weekly rotas for their staff they are assigning jobs, not delegating. Delegation involves giving a member of staff a specific task and giving that person some responsibility for its successful completion.

Read the two examples below, then answer the questions that follow using the space given under each question.

A. A banqueting manager calls five of her staff together and explains the layout and equipment required for a conference later that day in the hotel's main function room. She tells them that it must be ready for 4.30 pm and that if there are any problems they should come and find her.

B. Sue, the manager of the Brentlodge motor hotel calls in her assistant and tells him that the company is starting a new promotion of Russian vodka. She wants him to be responsible for making this promotion a success.

1. Is the manager in each of the examples delegating responsibility or assigning work?

Banqueting manager, example A: .....

Sue, hotel manager, example B: .....

2. For example A, describe another way in which the tasks could have been distributed?

1. The banqueting manager in example A *assigns work to* her staff, rather than delegate direct responsibility to them.

   Sue, hotel manager in example B, *delegates responsibility*. She gives the assistant specific responsibility for the vodka promotion.

2. The banqueting manager could have made one person responsible for the co-ordination of the work, a second for the layout of chairs and tables, a third for ensuring that all the necessary audio visual equipment was in place and worked properly, a fourth for covering the tables with green beige and a fifth for setting out the blotting pads, stationery, water glasses, ashtrays and so forth. She could have told them that each member of staff would be held responsible for their section of the operation and that they should help each other where necessary.

What to delegate

A task should be delegated if a subordinate could do it:

- better
- quicker
- cheaper

or, if it would help a member of staff in his or her development.

There are some situations in which the supervisor should *not* delegate, for example, when there are problems arising from:

- low morale of staff
- inter-departmental differences

and certain tasks which should not be delegated, for example those which:

- relate to the work unit as a whole, such as planning rotas
- you dislike undertaking yourself
- are your specific responsibility, such as setting individual objectives, discipline and confidential matters.

Make a list below of all the tasks involved in your job. Put a tick next to those which you often delegate.

It is much more common for managers and supervisors to delegate too little than to delegate too much.

Answer the following questions (honestly!).

1. Do you spend too much time carrying out tasks, and not enough in managing? (Refer to Section 3.)

YES/NO

2. Do you find you have to work excessively long hours in order to get your work completed?

YES/NO

3. Do you have to do a lot of checking up on the work of your staff?

YES/NO

4. Do you find that, at any given time, you have too many unfinished jobs on hand?

YES/NO

5. Do you fail to meet deadlines?

YES/NO

6. Do you seem to spend an excessive amount of time working on details?

YES/NO

7. Do you believe your staff would be capable of taking on extra responsibility?

YES/NO

8. Do you keep certain jobs to yourself simply because you like them?

YES/NO

If you answered 'yes' to two or more questions, it is quite probable that you have scope for increased delegation.

Now have another look at your list on page 86 and decide if there are any further tasks which you could delegate. Highlight these in some way.

Barriers to delegation

There are also certain barriers to delegation. These may be on the part of the staff to whom the task could be delegated, such as:

- lack of confidence
- feeling that the boss will interfere
- feelings about the job – it is demeaning, too difficult and so forth.

Or on the part of the person delegating (the boss), for instance:

- lack of trust
- setting standards that are too high
- fear of losing face.

It is important to recognise barriers where they exist – because they will tell you that the time is not right for delegation. But barriers of this kind can, and should, be removed.

Consider the examples given opposite and note down some ways in which these barriers might be overcome.

These are some of the things you may have thought of:

- Staff must feel *able* to do what is being delegated.
- Much can be achieved in developing confidence by the provision of appropriate *training*. Gradual delegation may help, starting with the least demanding responsibilities.
- Confidence will also be helped by the assurance of management *support*, the knowledge that there is somebody to fall back on.

Barriers which originate with you (the boss), only you can deal with. You must have trust in your staff (selectively, not blindly) – let them take responsibility bit by bit; people will surprise you by what they can do. You need never fear losing face by delegating; you will, in fact gain more respect because you will be seen to feel secure in your own job, and your position will be strengthened if you are seen to trust others.

Effective delegation

There are certain things which a supervisor or manager can do to improve the effectiveness of delegation.

Decide which tasks to delegate. Only delegate appropriate tasks.

Plan the delegation. Decide who should undertake the task. This might involve considering which staff have the appropriate skills, knowledge, and experience, and if the person would be interested in undertaking the job. But there are also many occasions when someone has the potential to take responsibility but not the knowledge and skill; specific training may be necessary before delegation can be effected. Also, remember to spread the delegation of jobs fairly among all staff.

Communicate and discuss. The supervisor or manager should discuss with the person to whom he or she is delegating, the task: the nature of the task, the scope of responsibility, and the expected results. Section 8, which follows, on giving instructions, contains useful guidance for this part of the exercise. The supervisor should also tell other staff that the task has been delegated.

Monitor progress and give support. The manager has overall responsibility for the tasks delegated and must ensure that standards are maintained by coaching staff where necessary. At the same time, it is important to stand back and give the person room to get on with the job, not to keep breathing down his or her neck. Monitor sensibly and sensitively.

SECTION 8
Giving instructions

After completing this section you will be able to:

distinguish between good and bad instructions

give instructions to your staff so that standards are clarified.

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TASK MANAGEMENT

You have recognised the importance of clarifying standards in relation to activities to be carried out. The next stage is ensuring that when you give instructions to your staff you are able to give them in an appropriate manner and with precise information regarding standards.

Read these two examples of instruction-giving. In the space after the second example note who you think has the better approach: John or Joyce, and why.

DIALOGUE 1

John *Jim, give me a hand here.*

Jim *Of course.*

John *Take a pound of butter and make some clarified butter.*

Jim *How?*

John *Put it in a pan in the bain-marie.*

Jim *In the what?*

John *Bain-marie - you know, the water bath at the end of the range.*

Jim *Oh! I see - what's it for?*

John *What's what for?* (angry tone)

Jim *Well, if you're going to be like that - both of 'em.*

John *Both of what?*

Jim *The clarified butter and the bain-marie.*

John *The butter is for meunièring the fish and the bain-marie's to keep things hot for the service.*

Jim *What's meunièring?*

John *It is a term used for shallow frying fish which has been lightly coated with flour before cooking.*

Jim *Oh great - thanks - now what 'things' do we keep hot for the service?*

John *Look! When you've made the butter, why don't you use your eyes and look.* (threatening tone)

DIALOGUE 2

Joyce *I'm going to show you how to pour this gin and tonic with the use of an optic. For some spirits, for example our range of malt whisky, you would use a thimble measure, but the optic – more correctly called a spirit measure – is easier to use. The first thing we need is obviously a glass and in this bar we use this size Paris goblet. What do you think we should be looking for and checking when we pick up the glass?*

Ken *That it's clean, nice and shiny.*

Joyce *Good. What else?*

Ken *I suppose that the rim is smooth and that it has not got any cracks or chips.*

Joyce *That's right. Tell me, Ken, why do you think I am holding it by the stem?*

Ken *Is it easier? I don't know.*

Joyce *What would happen if I put my hands on the bowl of the glass?*

Ken *Ah – you would get finger marks on it. And you might touch the rim, which would not be very nice for the person drinking from the glass.*

Joyce *That's right, hygiene and presentation are all important – so this is why we hold glasses by the stem or base.*

Now note who you think has the better approach and why.

It is clear to see that the second dialogue represents a better approach to instruction-giving. Joyce, the pub manager, ensures that for each activity to be performed, there is a detailed explanation and a standard laid down. She also shows patience with Ken, the new barman and gets him to think about the task and why particular standards are necessary. In the first dialogue, inadequate explanation is given. Consequently Jim has to bombard John with questions.

The second dialogue also introduces another important aspect to instruction-giving and that is the use of *teaching questions*.

Whenever you are explaining an important step in an activity, it is a good idea to ask the members of staff concerned what they think is the reason for the step. Using teaching questions in this way will enable you to:

- test existing knowledge
- find out whether what you have said has been understood
- get feedback on the assumptions and thoughts of the people being instructed – particularly important when it comes to communicating standards of performance.

This will give you a basis on which to build your instruction as you proceed.

> If staff are to carry out their activities well, it is always a good idea to explain to them why each particular activity needs to be done. After all, can YOU really do a good job if no-one explains to you why it is necessary?

Consider the following instructions and indicate below each one whether it is likely to be effective or ineffective. Try to give a brief explanation for your decision.

1. Restaurant manager to cashier

Check the money that customers give you, particularly notes.

EFFECTIVE ☐ *INEFFECTIVE* ☐

Reason

2. Manager to telephonist

When you cannot connect a caller, ask the person politely whether he or she wants to be put on hold. If the answer is 'yes', switch the call to 'musical hold' but make sure you interrupt every 30 seconds to ask whether the caller still wants to hold, or would rather leave a message or call back later. This helps the caller to feel reassured that you are doing what you can to help, and that he or she has not been forgotten.

EFFECTIVE ☐ *INEFFECTIVE* ☐

Reason

3. Manager to storekeeper

Store all deliveries of fresh meat and poultry in this cold store, where the temperature is correct and there is no risk of cross contamination.

EFFECTIVE ☐ *INEFFECTIVE* ☐

Reason

4. Bar manager to member of barstaff

Check the bottled beers to see that we have sufficient for this evening.

EFFECTIVE ☐ *INEFFECTIVE* ☐

Reason

1. This is a poor instruction. Why does the cashier need to check the money? There is the obvious answer 'to check that the money offered by the customer is sufficient to cover payment for his or her meal.' However, the manager may also be suggesting that the check should be made because customers sometimes attempt to use foreign currency for payment, or there may have been a number of forged notes being passed around in the local area. The basic element that is missing is 'why?'
2. This is a good instruction. It explains what to do and why.
3. This is a reasonable instruction, but it does not explain why the meat should be stored at a particular temperature or what products might be cross-contaminated. The storekeeper may think it does not matter if a few days later the temperature of the cold store has risen a few degrees, or if someone has put a tray of cooked meats in the same cold store.
4. Again, this is a poor instruction. A new member of the barstaff could not be expected to know what 'sufficient' means in this context because he or she will not be familiar with the bar's evening trade. A more precise instruction should be given.

In your own instruction-giving, make sure that you give complete and accurate information. This means identifying:

- who should carry out the task
- what they should do
- the standard of work to be achieved
- the time to be taken to carry out the task
- the time by which the task should be completed
- why it is important to maintain the standard laid down.

Whenever you give instructions to staff you should also consider their existing knowledge and experience so that you can build on what they already know. Sometimes it may mean demonstrating the standard of performance you expect.

> Instruction-giving also requires the use of appropriate words and the appropriate tone of voice. Furthermore, you need to motivate staff to perform the task to the standards you expect. These are dealt with in the companion self-study units: *Communications* and *Leadership and Motivation*.

Achieving performance standards also involves monitoring to what extent the standards are actually achieved. Use the space below to jot down your own ideas on how standards can be monitored.

There are a number of steps you can take to make sure that staff actually achieve the standards that you set. These are some you might have listed:

- If you have given verbal instructions, you can ensure there are also written instructions to which staff can refer if in doubt.
- You can allocate time each day or week to the supervision of tasks, so that you can maintain a direct physical check on how well standards are being achieved.
- You can devise reports which the staff themselves complete, or which come from information processed on a computer, or which control office staff compile, which indicates performance level: number of customers served per minute in a fast food unit; number of complimentary letters received; average room occupancy; and so forth.
- You reassure members of staff who experience difficulty in their work, that they can discuss the matter with you without facing a rebuke or disciplinary action.

This completes the self-study unit *Task Management*. If you have attended the HCTC course, you are now ready to complete the assignments which you will find in your Operational Management Planner.